Kansas
Department for Aging and Disability Services

Issue Tracking Application Instructions (Provider)

January 24, 2014

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General Instructions

Introduction The Issue Tracking application is an application to allow providers to report issues.

Overview The Issue Tracking Application is a KDADS web application.

System Requirements and Browser Settings

- **Firewall Settings** may need added.
  - To check if you will be able to access the KDADS Web Application site, follow the steps on pages 3-4. If the sign in page does not display, our site will need to be added to your firewall. Please contact the KDADS Help Desk for the specific address/port to be added to the firewall.
- Internet Connection
- Internet Browser:
  - Microsoft Internet Explorer 6.0 or newer - Recommended
  - Firefox – current version
- Disable all Pop-Up blockers

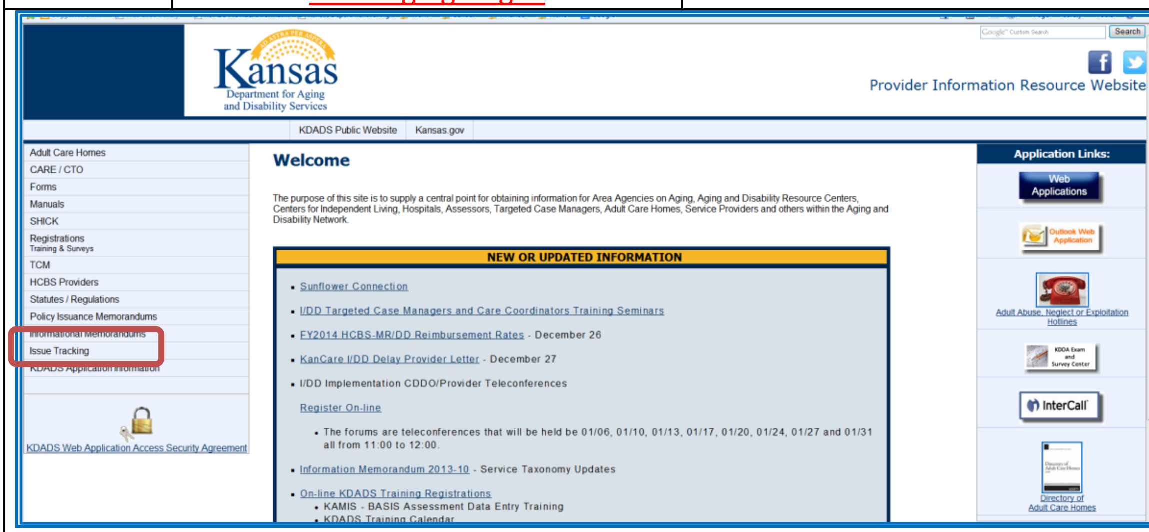
Contact Persons

Issue	Contact Person
Application How To Questions Password Change	KDADS Help Desk ***Phone:*** *(785) 296-4987* *or* *(800) 432-3535* ***E-Mail:*** *HelpDesk@kdads.ks.gov*
Questions about the Issue Tracking Policies and Guidelines.	***Phone:*** *(800) 432-3535*

Accessing the Application

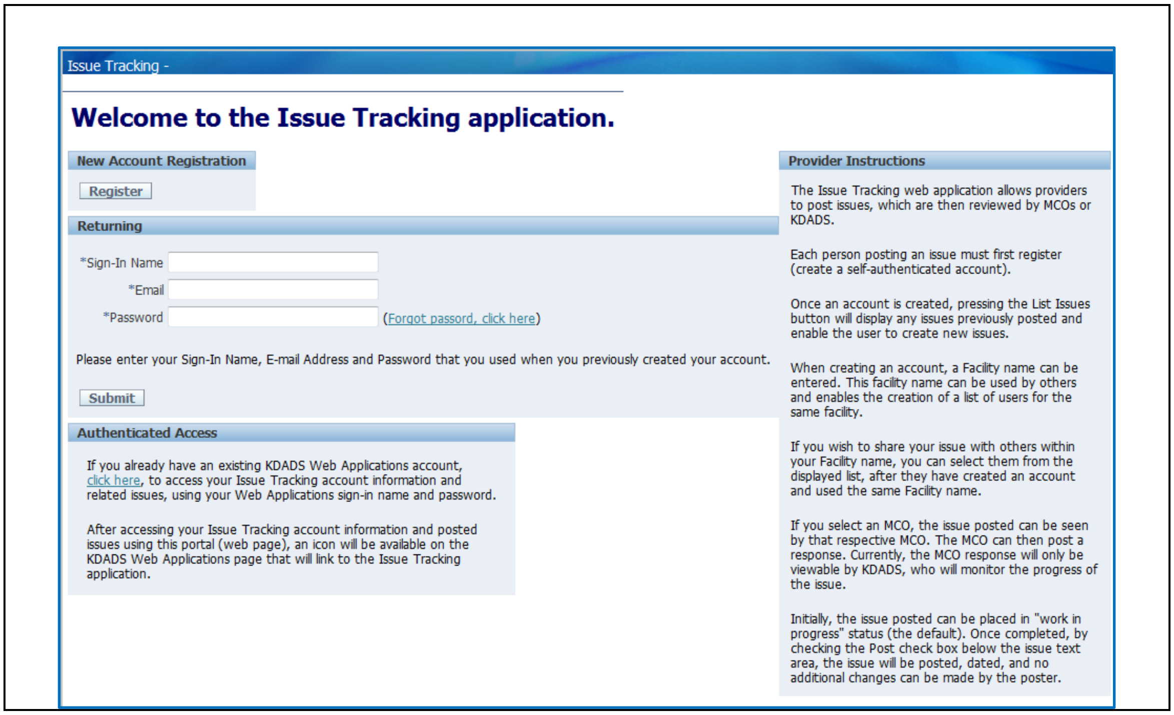
Introduction Use Microsoft Internet Explorer or FireFox browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted.

How To Follow the steps in the table below to accessing the login page for the Issue Tracking application.

Step	Action	Result
1.	Open the internet browser. Access the KDADS Provider Information Resource Web Site. www.aging.ks.gov	The KDADS Provider Web Site Home Page will be displayed.
		
2.	Select the **Issue Tracking** link on the left side of the page.	The KDADS Issue Tracking sign in page will display.

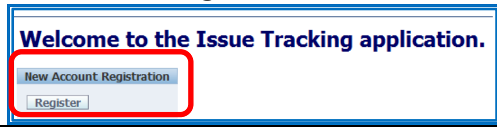
Continued on next page

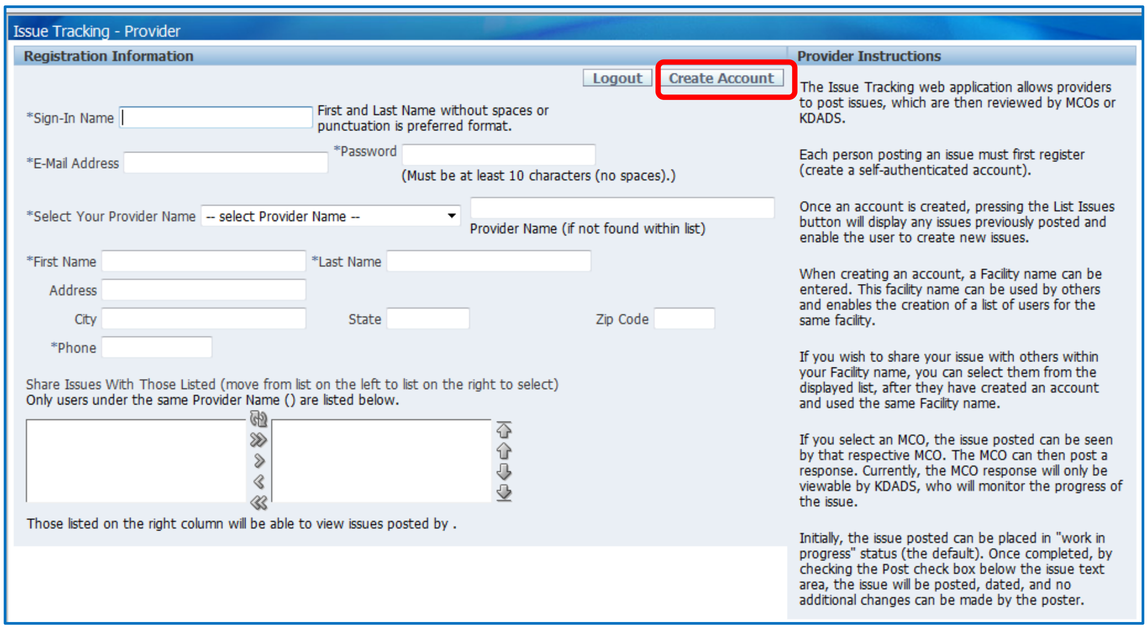
Accessing the Application (Continued)



Registration – New User

How To Follow the steps in the table below to complete the Registration process.

Step	Action	Result
1.	Click on the **Register** button.  	The registration page displays.

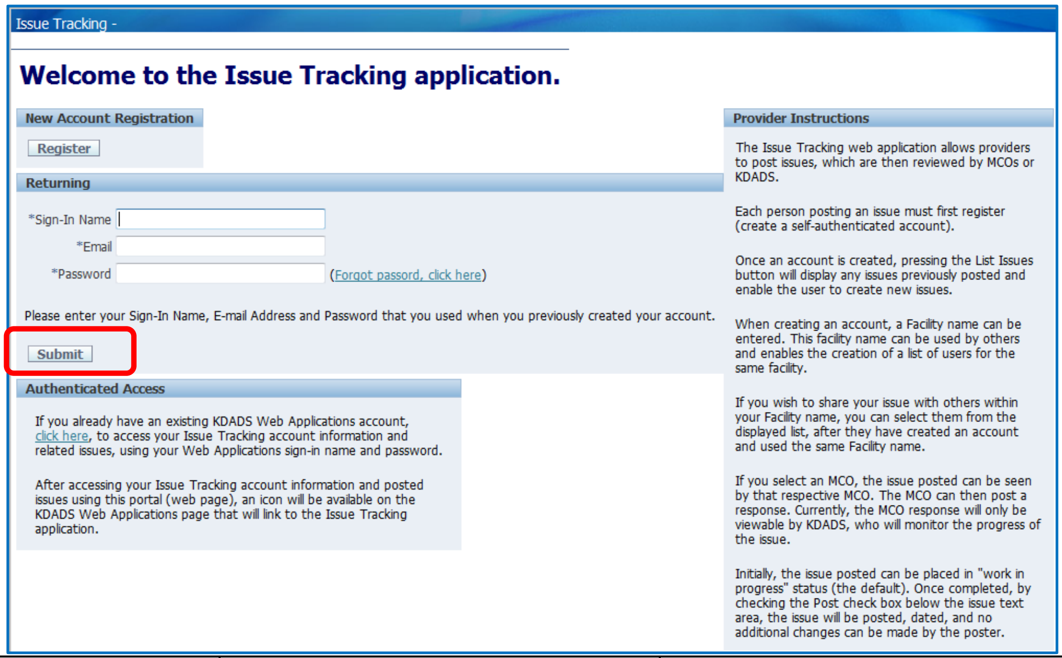


2.	Complete the information.	
3.	Click on the **Create Account** button.	The account is created.

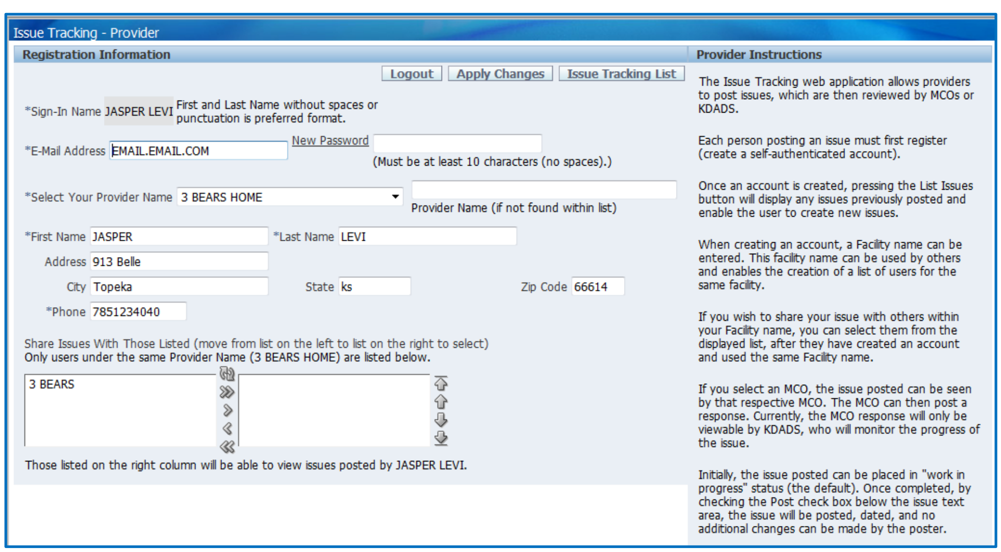
Logging-In - Returning User

Introduction Users that have not completed KDADS security authentication process will access the Issue Tracking system using the sign-in found in the **Returning** section.

Step	Action	Result
1.	Enter the Sign-In Name. E-mail address and password. Click on the **Submit** button.	



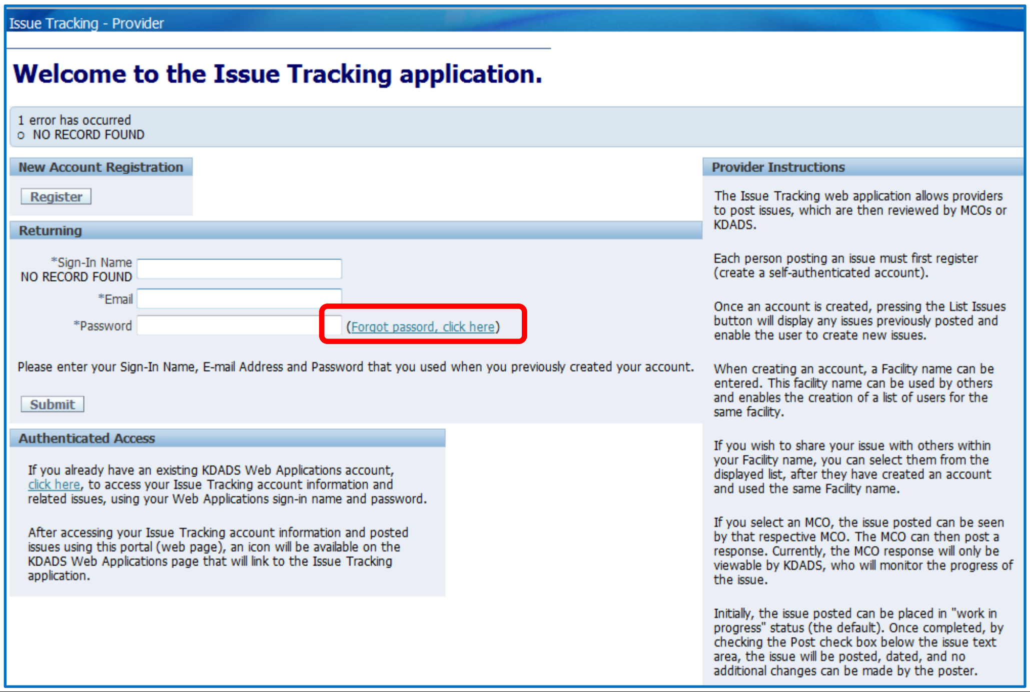
Step	Action	Result
2.	The Registration Information page will display.	



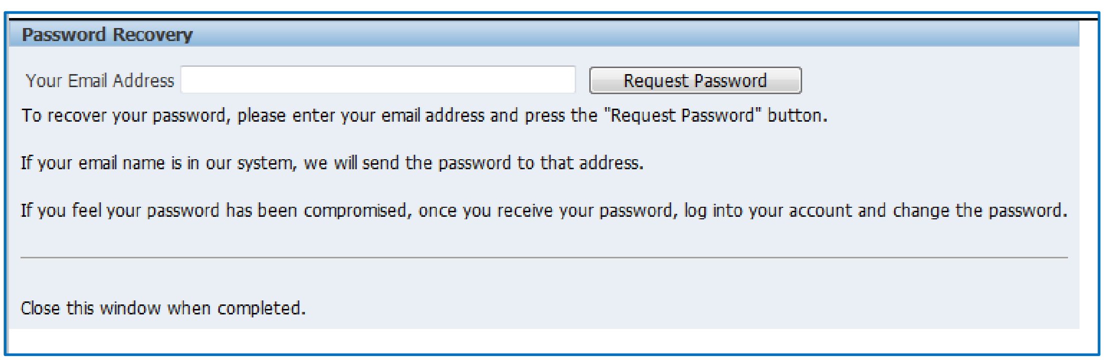
Logging-In –Password Recovery

Introduction Passwords can be recovered using the following process.

Step	Action	Result
1.	Click on **the (Forgot Password, Click Here)** link.	



2.	The password recovery page will display.	

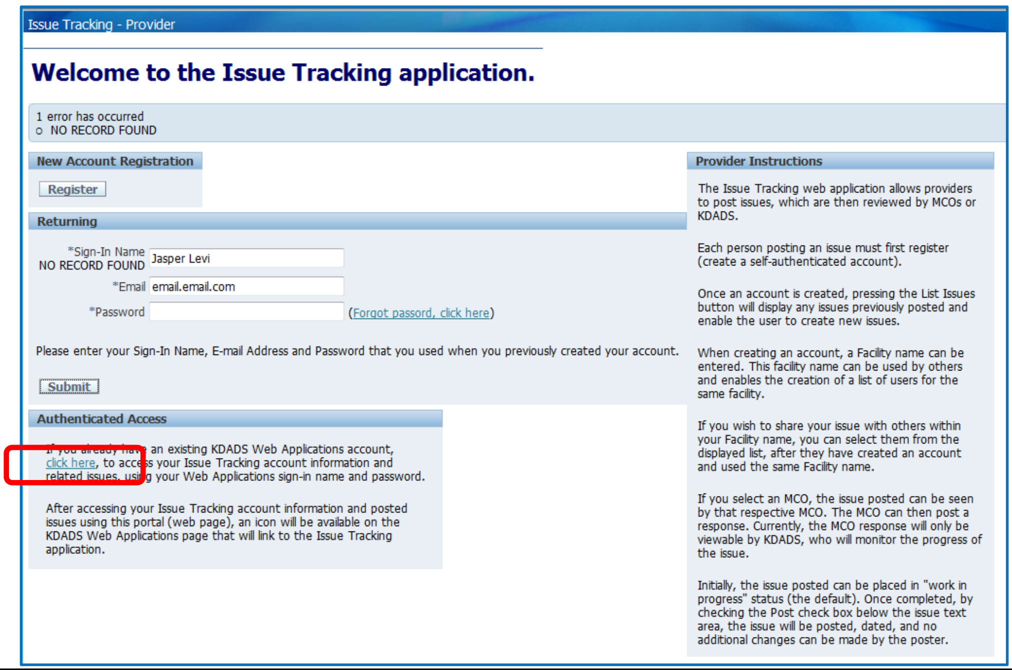


3.	Enter your email address and click on the **Request Password** button.	The password will be emailed to the address.
4.	Close the window when complete.	

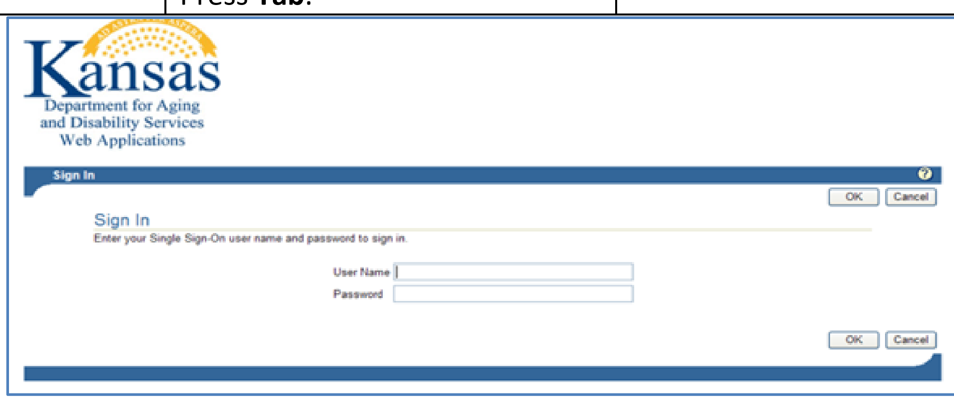
Logging-In – Authenticated User

Introduction Users that have completed KDADS security authentication process will access the Issue Tracking system using the sign-in found in in the **Authenticated Access** section.

Step	Action	Result
1.	Click on the **Click Here** link.	



Step	Action	Result
2.	The web application sign on page will display.	
3.	Once the Login page is displayed. Type the **User Name**. Press **Tab**.	Insertion point advances.



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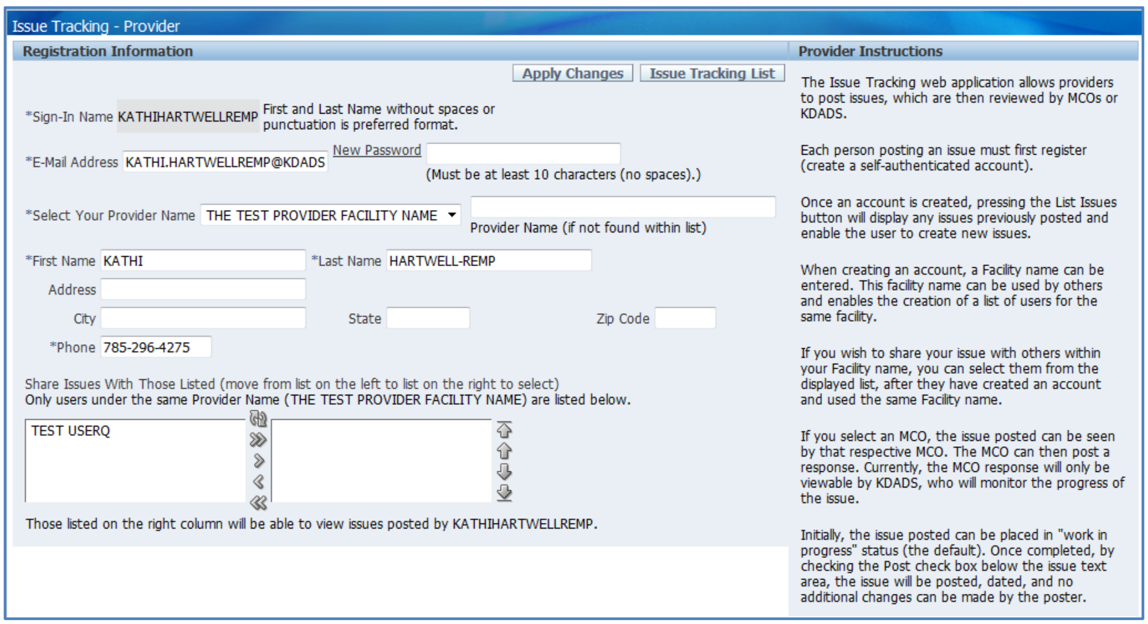
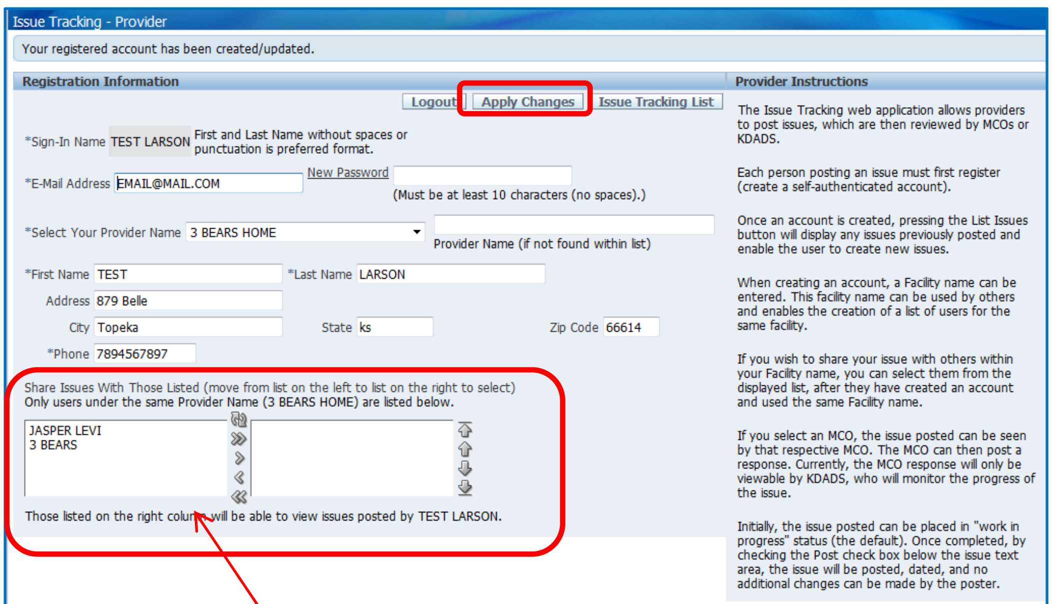
Logging-In – Authenticated User (Continued)

Step	Action	Result
4.	Enter **Password**. If it is the first time signing into the application, use the initial password that was issued in the e-mail from the KDADS Information Services Division. Click the **OK** button.	The **Registration Information** page will display.



How to Share Issues

How To Follow the steps in the table below to share issues.

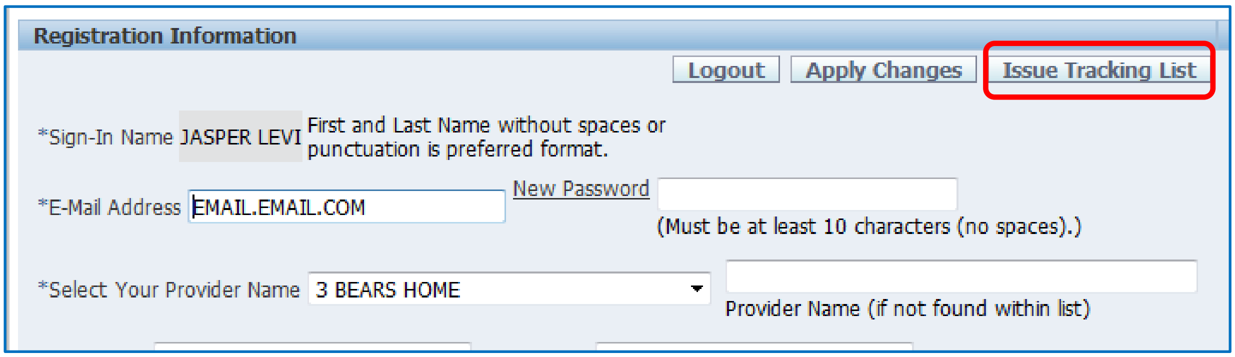
<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>Go to the Registration Information page.</td><td></td></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>2.</td><td>Click the individual(s) with whom issues will be shared then click on the shuttle arrow to move the individual(s) to the right.
Click on the Apply Changes button.</td><td>The information will be saved.</td></tr>
</table>

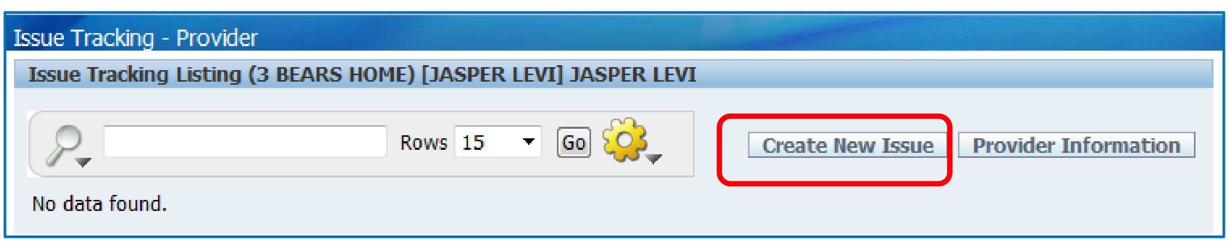
Entering an Issue- Non-Claim Related

How To Follow the steps in the table below to enter an Issue.

Step	Action	Result
1.	To enter an issue click on the **Issue Tracking List** button on the Registration Information page.	



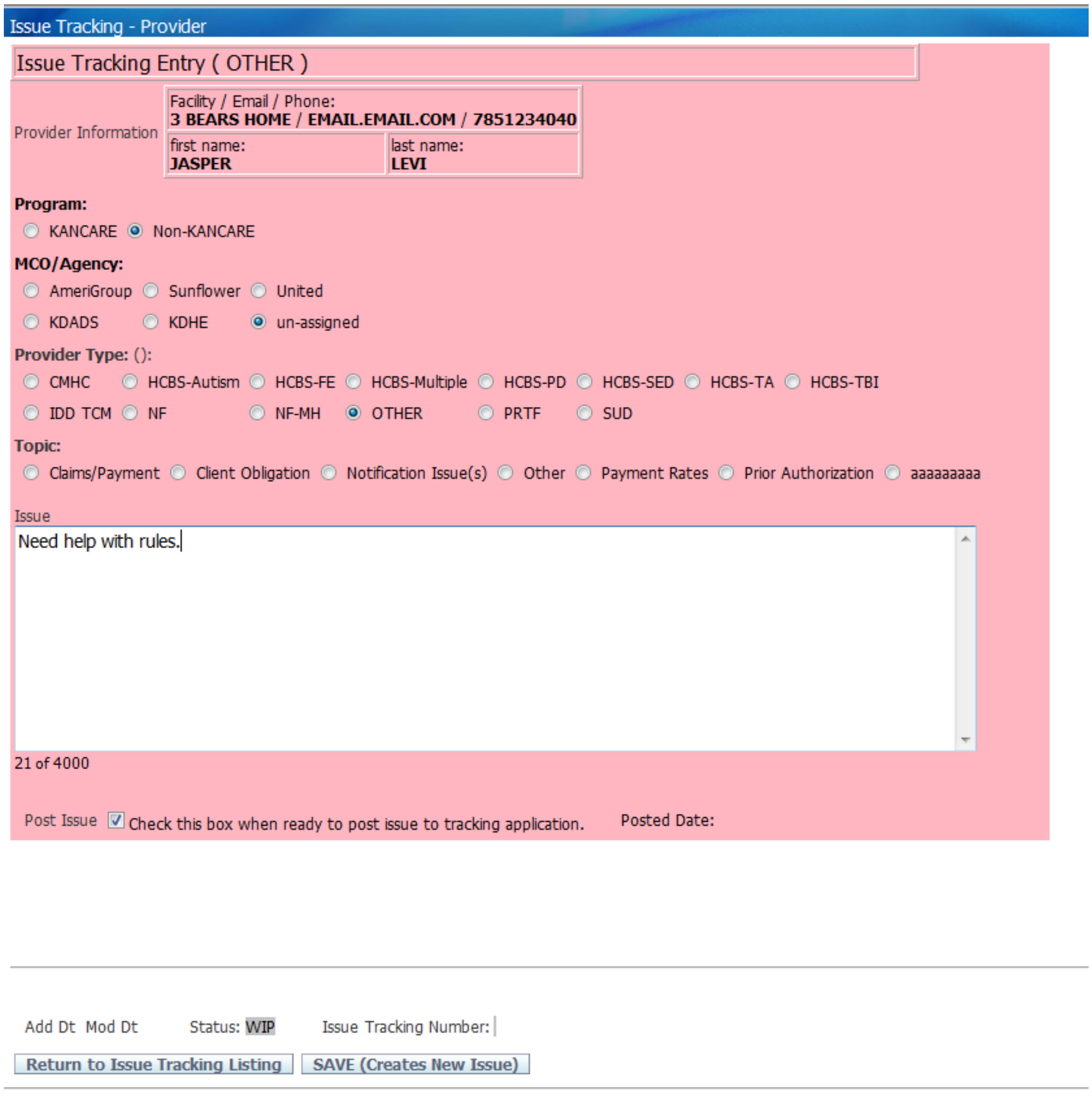
Step	Action	Result
2.	The Issue Tracking Listing page displays.	
3.	Click on the **Create New Issue** button.	



Step	Action	Result
4.	The **Issue Tracking Entry** page displays.	

Continued on next page

Entering an Issue- Non-Claim Related (Continued)



Step	Action	Result
5.	Select the appropriate catagories.	
6.	Enter the issue in the **Issue** text box.	

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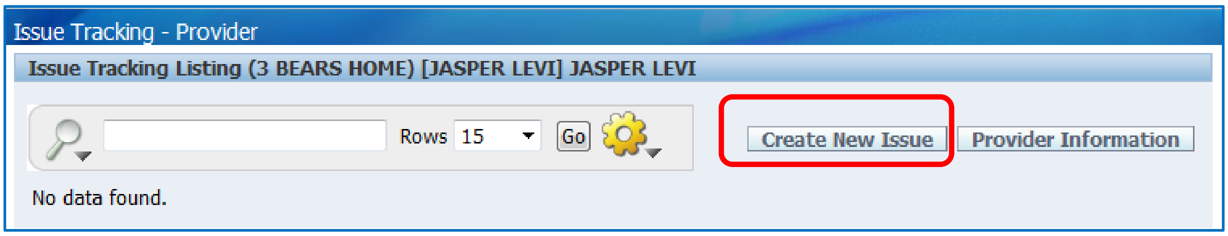
Entering an Issue - Non-Claim Related (Continued)

Step	Action	Result
7.	Check the **Post Issue** checkbox when all information has been entered.	
8.	Select the **SAVE (Creates New Issue)** button.	Saves the information. Posts the issue to the Issue Tracking system.

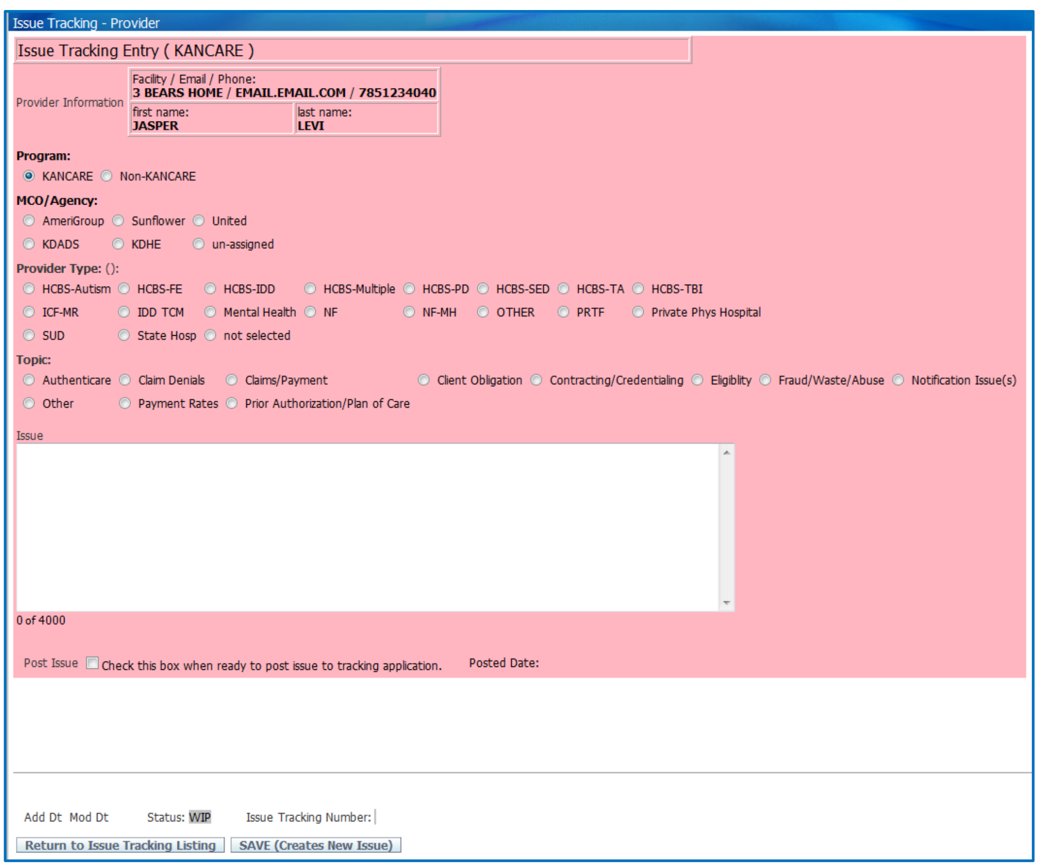
Entering an Issue- Claim Related

How To Follow the steps in the table below to enter an Issue.

Step	Action	Result
1.	Go to the Issue Tracking Listing page.	



Step	Action	Result
2.	Click on the **Create New Issue** button.	
3.	The **Issue Tracking Entry** page displays.	



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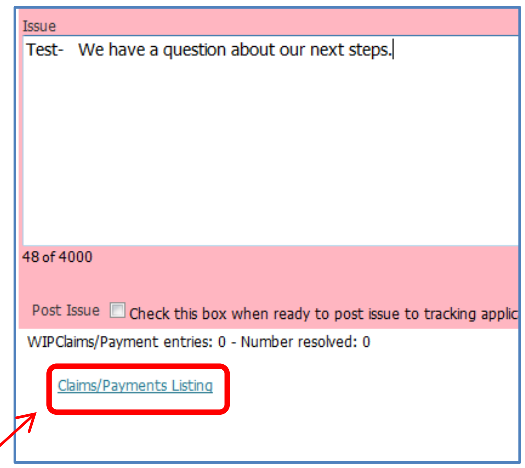
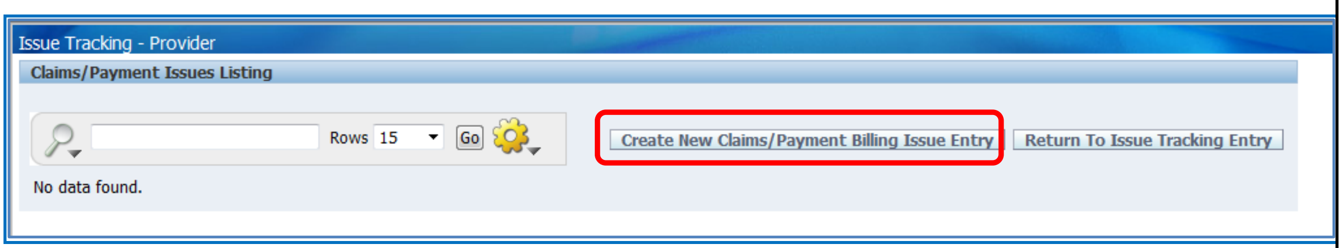
Entering an Issue- Claim Related (Continued)

Step	Action	Result
4.	Select the appropriate catagories. KANCARE and the MCO must be selected.	
5.	Enter the issue in the **Issue** text box.	
6.	Select the Claims/Payment radio button in the **Topic** section is selected, click on the **SAVE (Creates New Issue)** button.	A claims/Payment Listing link will display below the Issue text box.



Step	Action	Result
7.	Click on the **Claims/Payments Listing** link.	The Claims/Payment Issues Listing page will display.



Step	Action	Result
8.	Click on the **Create New Claims/Payment Billling Issue Entry** button.	
9.	Complete the appropriate information.	

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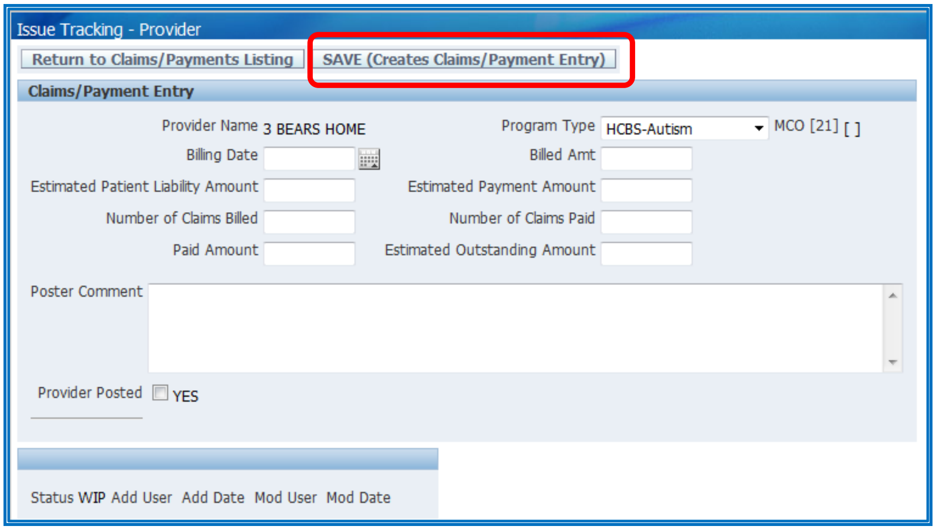
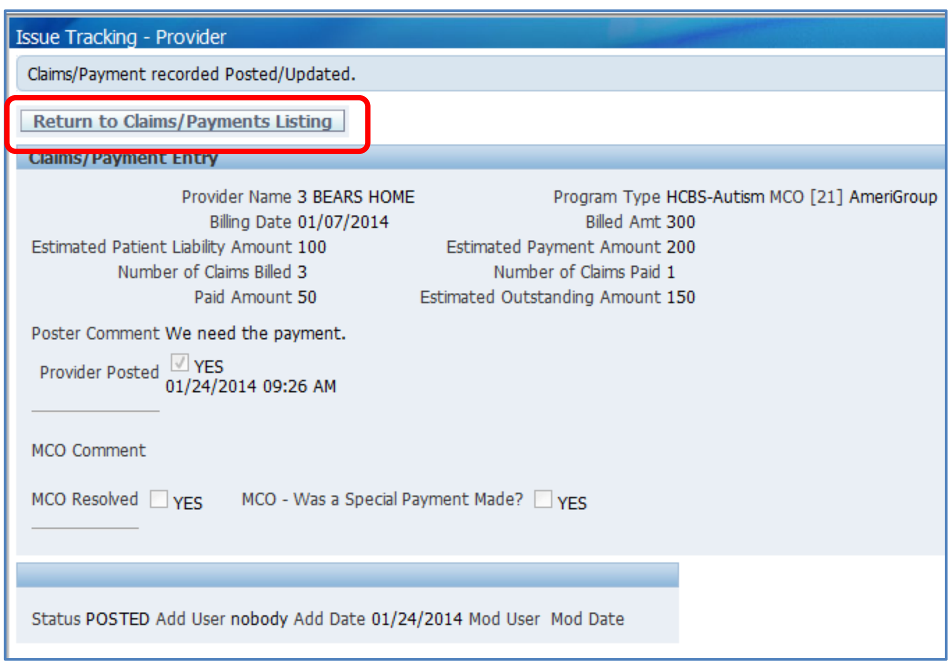
Entering an Issue- Claim Related (Continued)

Step	Action	Result



10.	Click on the **SAVE (Creates Claim/Payment Entry)** button.	The information is saved.



11.	Click on **the Return to Claims/Payment Listing** button.	The **Claim/Payment Issue Listing** report will display.

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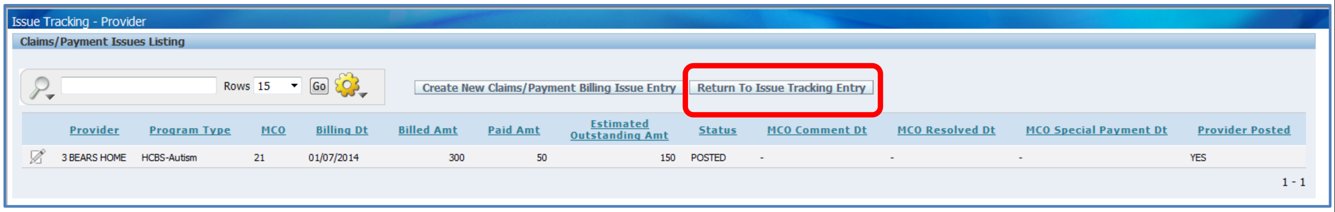
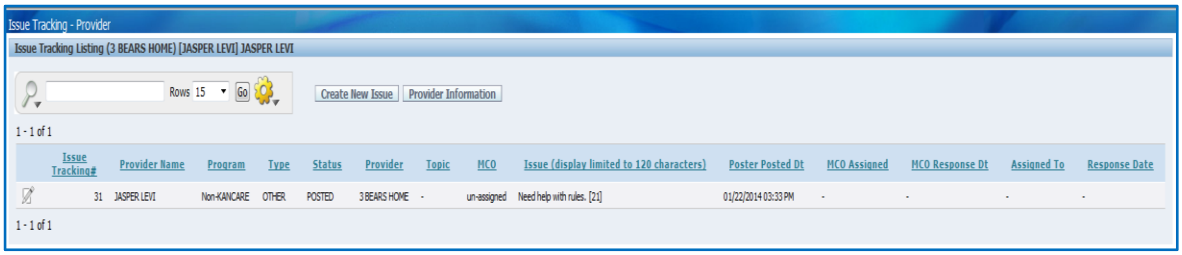
Entering an Issue - Claim Related (Continued)

Step	Action	Result
		
12.	Click on the **Return to Issue Tracking Entry** button to return issue.	The Issue Tracking Entry page will display.

Navigation – Issue Tracking Listing Report

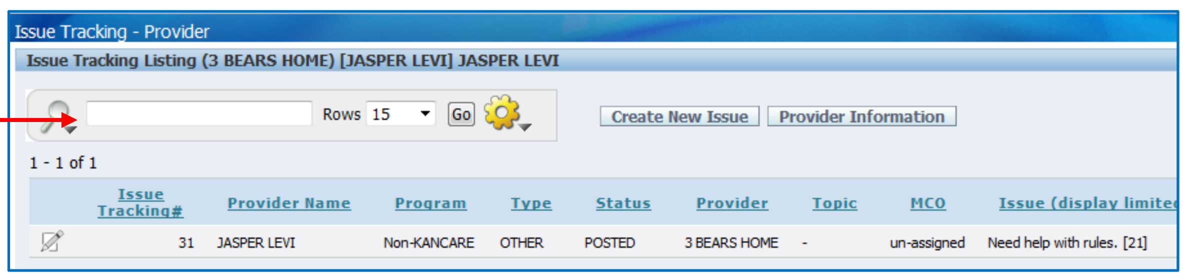
Introduction

The report displays the issues the provider has entered. The listing is an Interactive Reports, which gives the user a table view then allows the user to utilize filters and other reporting tools to create custom views of the data.



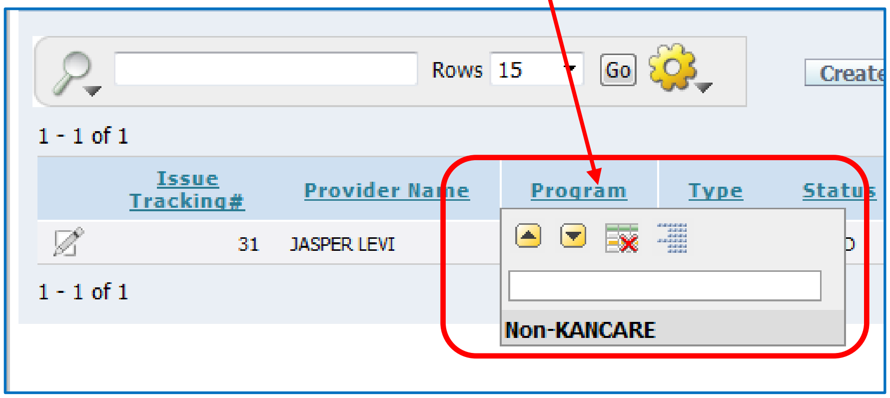
The report is interactive with a search field. Enter the criteria and click on the “Go” Button. Additional sorting and filtering options as well as a download utility can be found under the “Gear” icon. Detail instructions regarding additional features of the interactive report are located in this document on page 17.

Search Field



Navigation – Issue Tracking Listing

The report is also interactive by utilizing the column headings to sort or filter by the content.

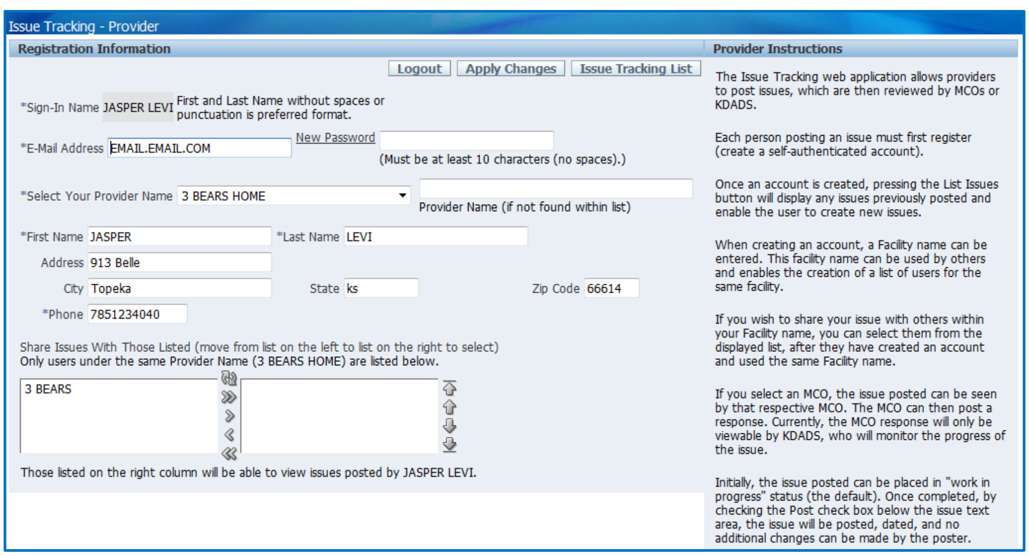


Navigation – Provider Information

Introduction The **Provider Information** button will display on the **Registration Information** page.

	Step	Action	Result
	1.	Click on the **Provider Information** button.	The **Registration Information** page displays.

Provider Information



Select the **Issue Tracking List** return to the issue list.

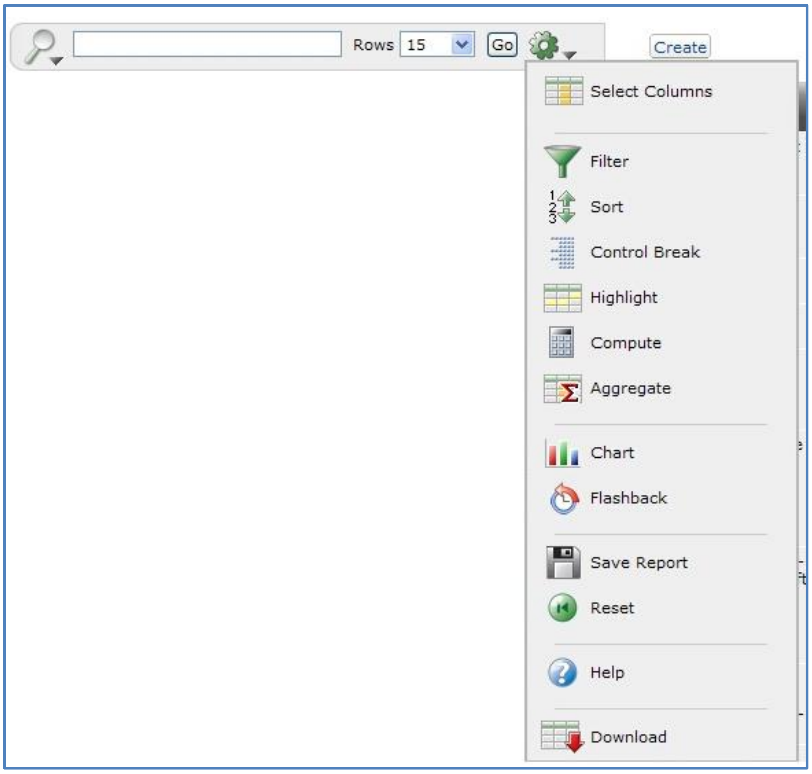
Issue Tracking Listing – Interactive Report Functions

Features

Below are the more commonly used reporting tools features offered by interactive reports.

How to

1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.

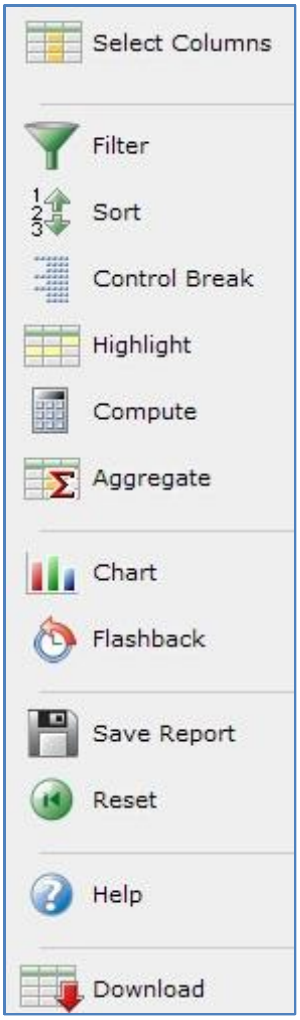


Functions Covered

This instruction guide will cover only the most commonly used report functions. Those functions are Filter, Sort, Control Break, Highlight, Save Report, Reset, and Download.

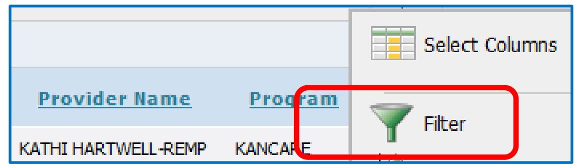
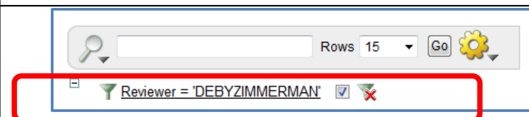
Issue Tracking Listing – Descriptions

Functions Below is the descriptions of the functions available in an interactive report.

<table>
<tr><th>Reporting Control List</th><th>Action</th></tr>
<tr><td rowspan="13">
</td><td>Select Columns – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.</td></tr>
<tr><td>Filter – Used to filter data for a more detailed view of information.</td></tr>
<tr><td>Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify how to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.</td></tr>
<tr><td>Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.</td></tr>
<tr><td>Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.</td></tr>
<tr><td>Compute – Computations allow you to add computed columns to your report. These can be mathematical.</td></tr>
<tr><td>Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.</td></tr>
<tr><td>Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.</td></tr>
<tr><td>Flashback – Not available.</td></tr>
<tr><td>Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.</td></tr>
<tr><td>Reset – Restores report to the default settings.</td></tr>
<tr><td>Help – On-line Help on report functions.</td></tr>
<tr><td>Download – Allows the current report to be downloaded. The download formats is CSV which can be opened through Excel.</td></tr>
</table>

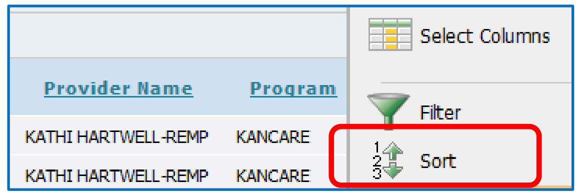
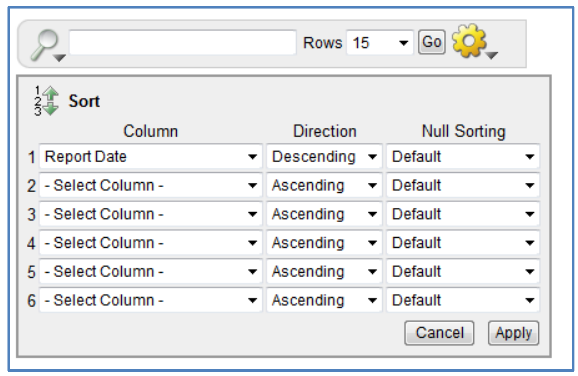
Issue Tracking Listing – Filter

How To Follow the steps in the table below to filter a Report.

Step	Action	
1.	Select **Filter** from the Control list.	
2.	Select the **Column** to filter Select the **Operator**	
3.	Select the **Expression**. • By clicking on the drop down arrow at the end of the express field, options will appear if appropriate.	
4.	Click on the "**Go**" button. Report will display. The filter criteria will display at the top of the report.	 Check Box = Enable or Disable the filter Filter = Removes the filter

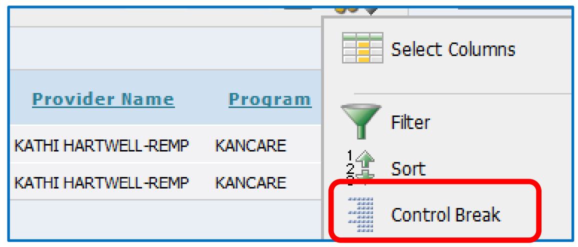
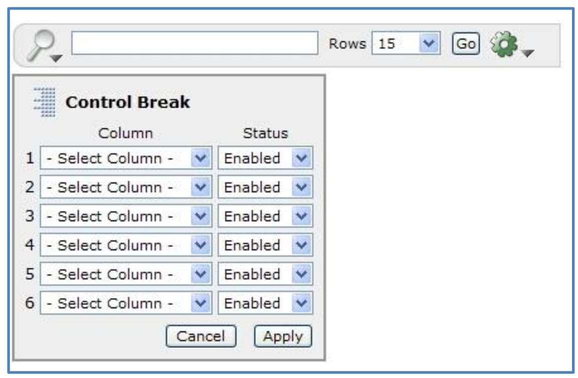
Issue Tracking Listing – Sorting

How To Follow the steps in the table below to sort a Report.

Step	Action	
1.	Select **Sort** from the Control list.	
2.	Select the **Column**(s) to be sorted. Select the **Direction** (Ascending or Descending) Select how the **Blank Fields** (nulls) should be displayed.	
3.	Click on **Apply**. Report will display.	

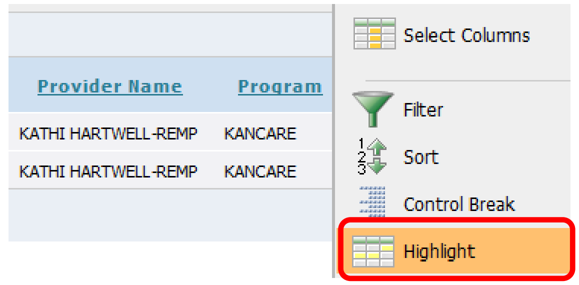
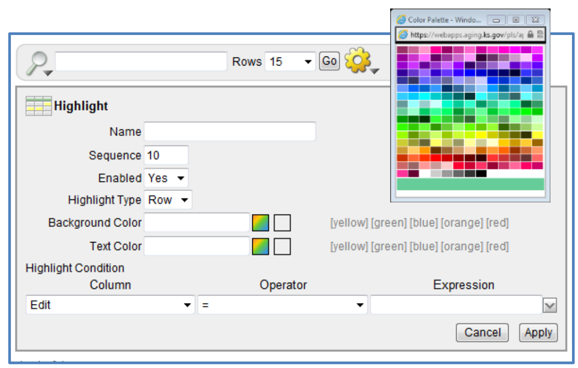
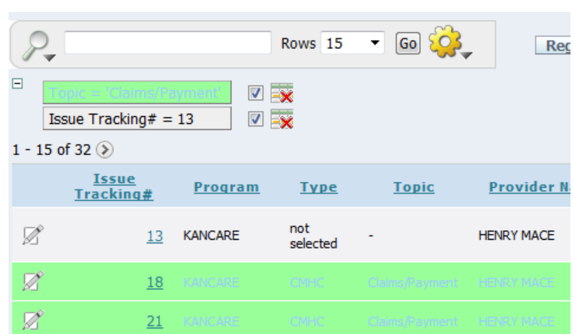
Issue Tracking Listing – Control Break on Information

How To Follow the steps in the table below to create breaks on the data information.

Step	Action	
1.	Select **Control Break** from the Control list.	
2.	Select the **Column**(s) the data will break on. Select if the **Break Status** is enable or disenabled.	
3.	Click on **Apply**. Report will display. The column selected in Step 2 will become headers.	

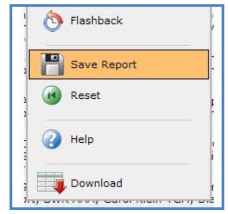
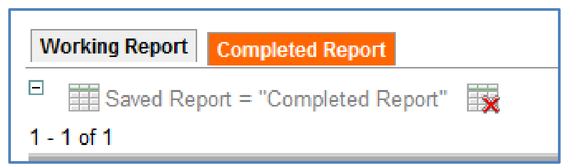
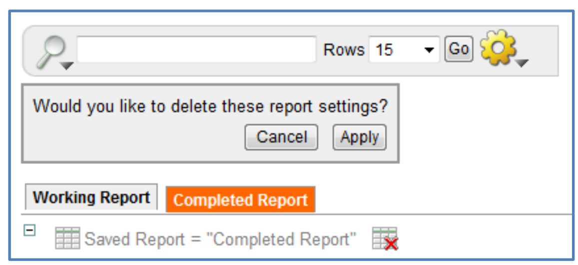
Issue Tracking Listing – Highlight Information

How To Follow the steps in the table below to apply highlights to the Report.

Step	Action	
1.	Select **Highlight** from the Control list.	
2.	Select the **criteria** for the highlight display. • Name • Enabled • Highlight type • Background Color • Text Color • Column • Operator • Expression	
3.	Click on **Apply**. Report will display.	

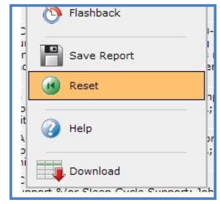
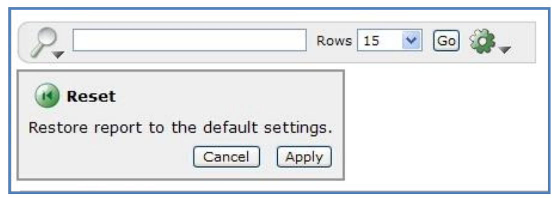
Issue Tracking Listing – Saving

How To Follow the steps in the table below to save a specialized Report.

Step	Action	
1.	Select **Save Report** from the Control list.	
2.	Enter the **Name** of the Report to be saved. This will become the Report Tab's name.	
3.	Click on **Apply**. Report will display on a separate tab.	
4.	If the report is no longer needed, it may be deleted. 1. Click on the **delete** icon (icon with red X) 2. Dialog box will display **confirming** deletion of the report. 3. Click on **Apply**.	

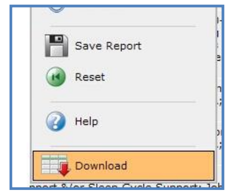
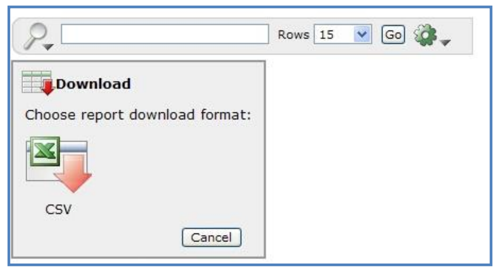
Issue Tracking Listing – Reset Report

How To Follow the steps in the table below to reset the Report back to default.

Step	Action	
1.	Select **Reset** from the Control list.	
2.	Click on **Apply** to reset the report.	

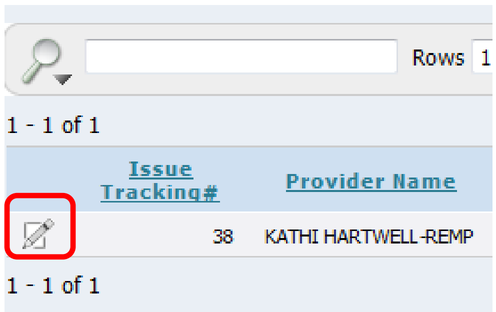
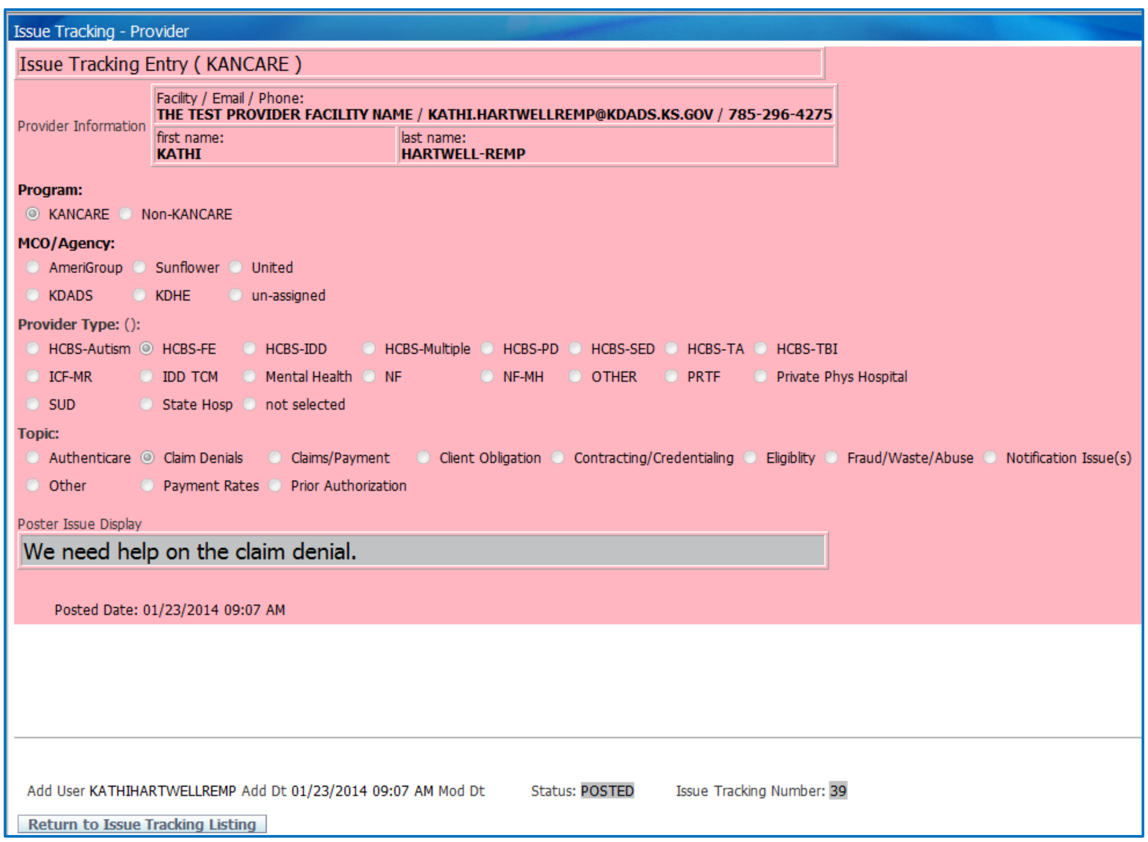
Issue Tracking Listing – Downloading Data

How To Follow the steps in the table below to download the report data.

Step	Action	
1.	Select **Download** from the Control list.	
2.	Click on the **CSV** Icon. The only option in the download format is CSV.	
3.	File download dialog box will display. Select **Save**.	
4.	Save As dialog box will display. Select the **location** (Save in) and the **File name**.	
5.	Browse to the File Location and **Open** file in Excel.	

Issue Tracking Entry Detail

How To Follow the steps in the table below to access the report detail.

<table>
<tr><th>Step</th><th>Action</th><th>Result</th></tr>
<tr><td>1.</td><td>Under the Edit Column, click on the paper icon.

</td><td>The detail page will display.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>2.</td><td>Select the Return to Issue Tracking Listing button to return to the report.</td><td></td></tr>
</table>

Logging-Out

Introduction

When the user will not be using the application for a period of time, log off the program for security reasons.

How To

Follow the steps in the table below to exit the application.

Step	Action	Result
1.	In the upper right corner of the window, there are three navigational options.	

Link	Action
Logout	The browser will return to the Log-in page
KDADS Home Page	Returns back to the KDADS Home Page for further access options.